



CLIENT SERVICE REPRESENTATIVE (CSR) JOB DESCRIPTION

Job Title: Client Service Representative
Support For: Benefits, Payroll, and HR
Reports To: Human Resource Department
FLSA Status: Non-Exempt
Supervise Staff: No

JOB SUMMARY: The Client Service Representative is responsible for providing effective customer support for all internal and external clients by using excellent, in-depth knowledge of company products as well as communicating effectively with team members from various departments. The target is to ensure excellent client support standards and maintain high customer satisfaction.

ESSENTIAL FUNCTIONS OF POSITION:

- Assist Benefit Account managers with Benefit Administration functions including:
 - Insurance Products - Add's, Terms and Changes
 - Research Client and Employee Benefit Questions
 - EOB's, Life Events, Plan Information, Exclusions, Provider Research, Deduction Research/Costs
- Work closely with the Director of Benefits to assist with projects including but not limited to new business and renewal quoting, enrollments, introducing Medicare solutions, reconciliations, and assist CSR's with ongoing benefit administration training and development.
- Answer client support phone calls, support voicemails and support inbox e-mails for all of the following client needs: Client Reporting, Client Security, Garnishment Inquiries, Lost Checks and Vouchers, Basic system support, Delivery Issues, 3rd party sick pay, W2 Inquiries, Direct Deposit research questions, Tax inquiries.
- Record and Manage all client calls (cases) in Sales Force
 - Open cases – CSR responsible for communicating to clients/employees, updating status of case and closing out case once resolved.
 - If internal assignment is given, CSR is still responsible for having Triton internal Rep obtain the info and respond back so CSR can communicate to client/employee, update the case and look to close case out
- Respond to inquiries regarding ADP products
- Answer technical and non-technical questions
- Identify and assess client's needs to achieve satisfaction
- Direct requests and unresolved issues to designated department
- Build sustainable relationships of trust through open and interactive communication
- Handle complaints, provide appropriate solutions and alternatives within the time limits
- Follow up to ensure resolutions have been met
- Be knowledgeable within the HR/Benefits/Payroll Industry
- Answer new business calls and direct accordingly to the Director of Sales
- Follow communication procedures, guidelines and policies
- Handles changes in policies or renewals.
- Serves as liaison with Benefits, Human Resources, Marketing, Sales & Payroll.



- Works closely with Accounting to ensure clients are being properly billed and processed accordingly
- Provide feedback on the efficiency of the customer service process

JOB QUALIFICATIONS:

- High school degree or Associates degree
 - 2-3 years customer support experience
 - Strong phone and listening skills
 - Familiarity with CRM systems and ADP products
 - Excellent communication and presentation skills
 - Ability to multi-task, prioritize and manage time effectively
- Senior CSR must have 5 years minimum experience in Benefits Administration.

SKILLS:

- Excellent data entry skills.
- Strong oral and written communication skills
- Strong client relationship and interpersonal skills
- Must be technologically savvy
- Strong problem-solving and analytical skills.
- Ability to identify sales opportunities and develop new accounts
- Self-motivated, high energy, goal oriented and a positive attitude.
- Must be able to work both independently and in a team environment.

JOB DESCRIPTION TERMS OF ACCEPTANCE

I have read the over job description for the position of Client Support Representative at Triton HR. I fully understand the job description. I am able to perform the job and meet the job requirements of the position. I also understand that Triton HR may revise this job description at any time as business needs dictate. I realize that the job description is not intended to be an exhaustive listing of all of the functions of the job, nor is it to limit Triton HR's right to assign other functions to an employee in this position. This job description does not constitute a written or implied contract of employment and does not alter the employment at-will relationship.

Please Sign and Date after reviewing the job description:

Employee: _____

Date: _____